

# Technical guidance for the Electronic Exchange Platform (EEP)

This guidance contains key technical information on the operation and use of the Electronic Exchange Platform (EEP) of the European Urban Initiative (EUI). Applicants are requested to complete and submit their Application Form (AF) via the EEP. Therefore, it is highly recommended to read this document carefully before using the EEP. This technical guidance complements the EUI Guidance which is also available on the EUI website.



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**TECHNICAL INFORMATION AND SYSTEM REQUIREMENTS**

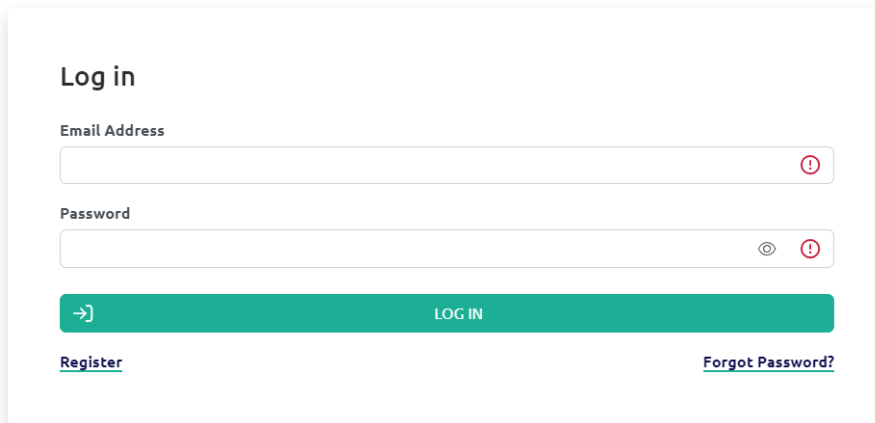
The EEP is a web application which can be accessed with recent versions of most common browsers (e.g. Google Chrome, Microsoft Edge, Mozilla Firefox). The functionality of the system follows the common standards of web applications for entering and submitting data.



# 1. ACCESS AND REGISTRATION

The EEP can be accessed at the following link: <https://connect.urban-initiative.eu>

To use the EEP, each applicant (or user) must first create a personal account by clicking on "Register" on the EEP homepage.



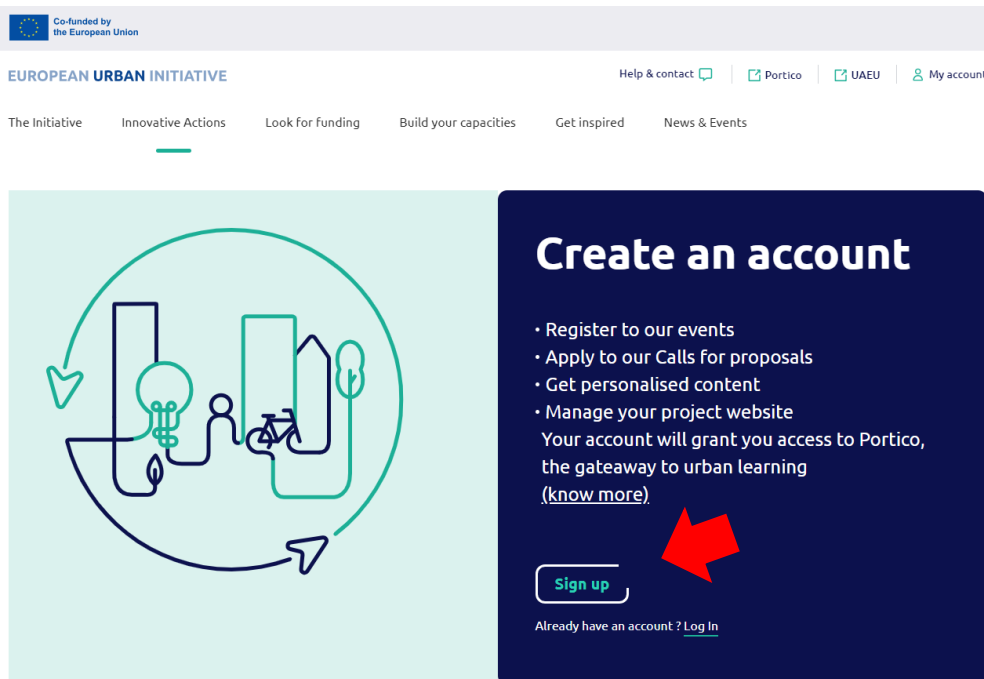
Log in

Email Address

Password

[Register](#) [Forgot Password?](#)

The user will be automatically redirected to the EUI website, where the account creation will take place.



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EUROPEAN URBAN INITIATIVE

Help & contact | Portico | UAEU | My account

The Initiative | Innovative Actions | Look for funding | Build your capacities | Get inspired | News & Events

**Create an account**

- Register to our events
- Apply to our Calls for proposals
- Get personalised content
- Manage your project website

Your account will grant you access to Portico, the gateway to urban learning ([know more](#))

Already have an account? [Log In](#)



(see next page preview of the registration form)

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Help & contact | Portico | UAEU | My account

The Initiative | Innovative Actions | Look for funding | Build your capacities | Get inspired | News & Events

← Home

# Create an account

To attend our events, apply to our calls for proposals & get personalised content

- Personal information
- Job and organisation
- Interests
- Privacy policy & Data Protection

## Personal information

### About you

First name \*

Last name \*

Email \*

Phone number

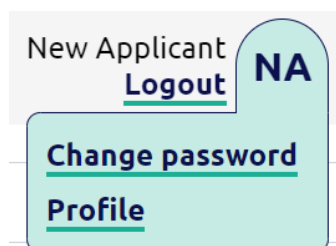
### Password

Password \*

Confirm password \*

After having filled in and submitted the registration form, a confirmation email is automatically sent to the email address provided in the form. To activate the account, the applicant must click on the link included in the email.

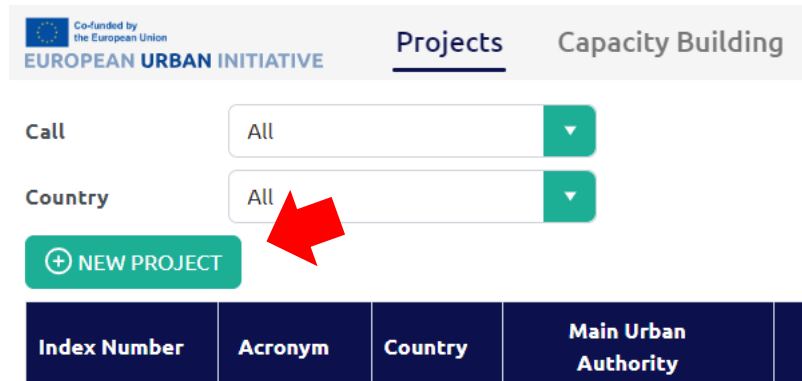
Any user can modify her/his password by clicking on her/his initials in the upper right corner of the screen and then on "Change password".



A password recovery function ("Forgot password?") is also available on the EEP homepage (see screenshot on page 2 of this document).

## 2. FILLING IN THE APPLICATION FORM

To create an Application Form (AF), the user must first click on "+ New Project" under the section "Projects" of the dashboard.



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Projects Capacity Building

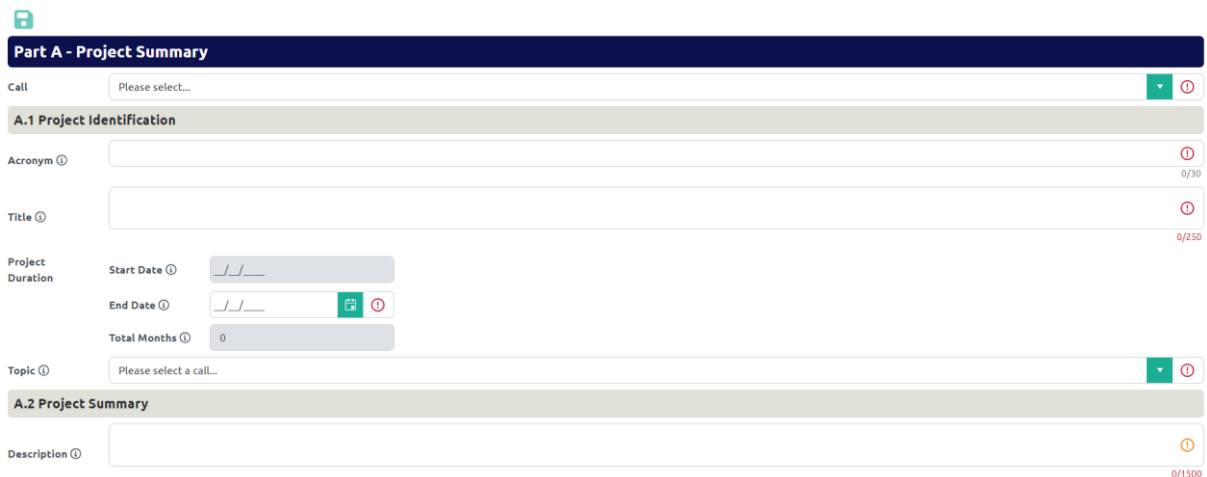
Call All

Country All

+ NEW PROJECT

Index Number	Acronym	Country	Main Urban Authority
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A new page will open. The user is then required to fill in at least the section "A.1 Project Identification" of the part A – Project summary and click on the "Save" button (on the top left corner) to complete the creation of a new AF.



Part A - Project Summary

Call Please select...

A.1 Project Identification

Acronym 0/30

Title 0/250

Project Duration

Start Date

End Date

Total Months 0

Topic Please select a call...

A.2 Project Summary

Description 0/1500

- Point of attention 1: at this very first stage, the section "A.2 Project Summary" is not compulsory. However, it will be mandatory to complete this field before submitting the AF.
- Point of attention 2: only when the call and all the fields in section 'A.1 Project identification' have been completed does the "Save" button become active (i.e. from light to dark green; function present at the top of the left menu).



The menu of an AF looks as follows. All fields in all AF parts are **mandatory**.

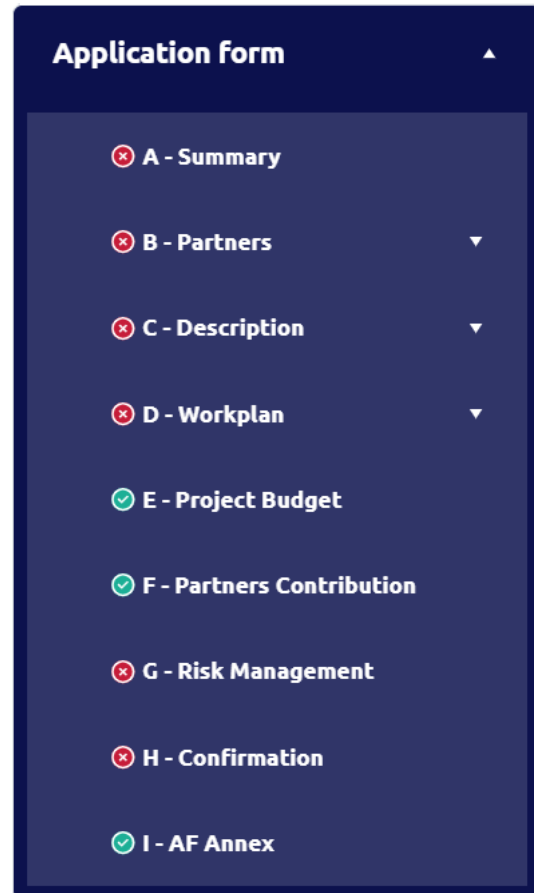


→ The “error/warning” symbol is alerting the presence of inconsistent/missing information in a specific part of the AF.



→ When a section is correctly filled in, the “error/warning” symbol alerting the presence of inconsistent/missing information turns into a “green light”.

Although automatic checks are foreseen in the EEP, **it is still the applicant’s responsibility to verify that the AF is properly filled in.**



The following important aspects must be remembered when filling in the AF:



- Guidance to fill in the AF is always indicated by info bubbles ⓘ and is **available in 24 languages**.

To select the language of your choice, a language menu is available anytime by clicking on the flag at the top of each page, next to the user name:





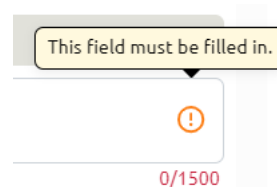
- Being inactive for a long period may automatically end the user session for security reasons and unsaved data will be lost. A timer is available next to the user name – this is reset to an hour each time a page is saved or the user moves to another part of the AF.



- Fields in the EEP have **character limitations**. Characters in excess will not be considered. The punctuation and spaces between words or paragraphs are considered as characters. Please note that as long as the character limitations are not respected in every field of a part of the AF, the following "error/warning" symbol  remains active in the left menu.
- **Data should be saved regularly** by clicking on  (at the top of the left menu) to avoid losing them in case of technical issues (e.g. interruptions of the internet connection). Do not use the "Enter" key of the keyboard to save data while filling the forms as it may lead to unexpected results. Always use the commands provided by the EEP interface.


Always remember to save the data before leaving a section in the AF; otherwise, changes will be discarded!

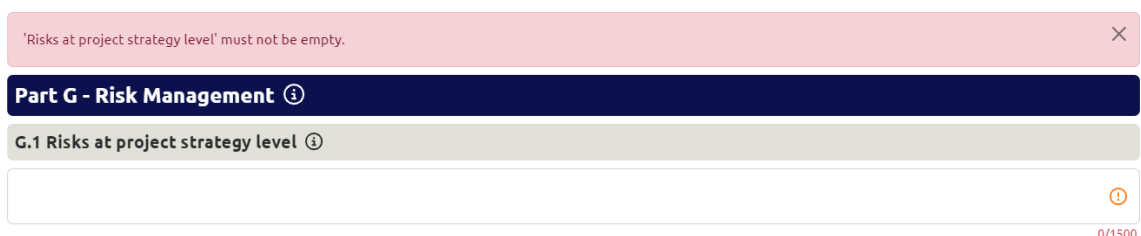
- Warning symbols   are present throughout the AF to guide the applicant step by step – read carefully the associated supporting messages by passing your cursor on them.



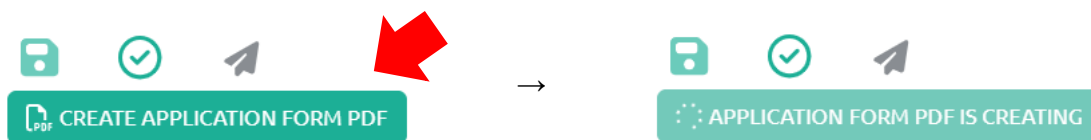
- The sequential order of the predefined Work Packages and activities follows the order in which they were added in the EEP. This order cannot be changed by the applicant.
- The current call for proposals has different topics. In part A – Summary, an applicant must select first one topic. Based on this, the EEP will automatically indicate in relevant drop-down menus the associated result and output indicators (respectively in part C – Description and part D – Workplan).


Should the applicant decide to modify at a later stage the topic selected in part A - Summary, the result and output indicators will have to be adjusted accordingly. It remains the responsibility of the applicant to carefully revise and countercheck all the information present in the sections addressing result and output indicators (e.g. description, baseline, target value, etc.).

- All applicants must upload a signed Confirmation Sheet (part H). The use of electronic signature is accepted.
- By clicking on the function "Check for errors"  (at the top of the left menu), applicants can see if the fields present on the page checked are correctly filled in or not. The results of the check are displayed at the top of the page.



- A PDF of the AF can be generated at any moment in part A – Summary, by clicking on "Create Application Form PDF" at the top of the left menu. The creation of a PDF may take several minutes.

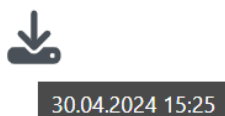


Once ready, the PDF can be downloaded via the function "Download PDF"  appearing automatically at the end of the process.



A new version of the PDF can be generated at any time with the function "Update Application Form PDF" (the latter automatically replaces "Create Application Form PDF" right after the creation of the first PDF). The creation of a new PDF may also take several minutes and at the end of the generation process, it can be downloaded via the same function "Download PDF".

By passing your cursor on the function "Download PDF", the user can read the date and hour of the latest PDF generated and available for download.



Please note that the EEP system does not store all the PDF versions generated, but only the latest one.



## 3. PARTICULAR ISSUES IN PART D – WORKPLAN

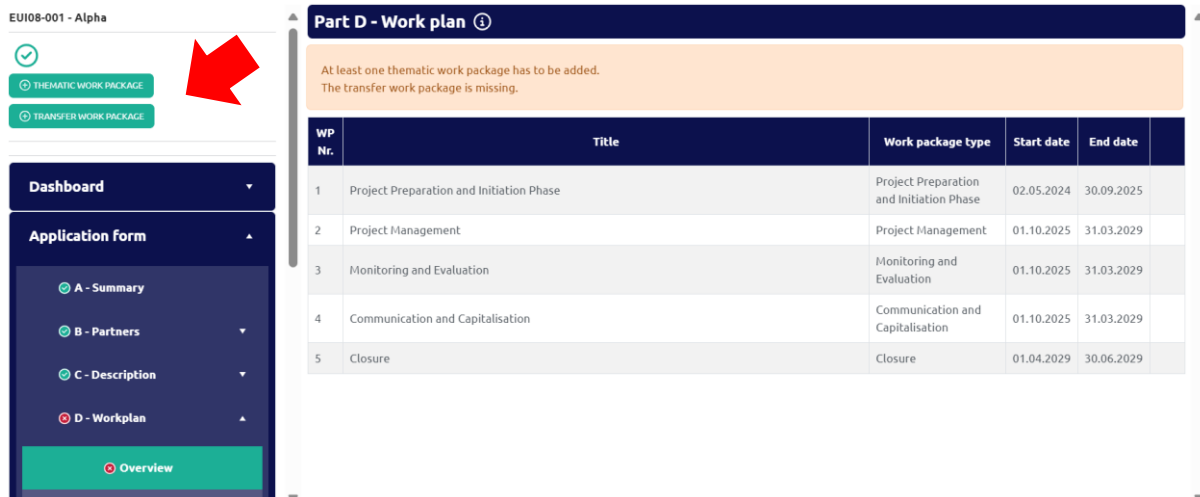
### 3.1. WORK PACKAGE PROJECT PREPARATION AND INITIATION PHASE

The Work Package (WP) Project Preparation and Initiation Phase is predefined by the system. The only involved and responsible partner on this WP is the Main Urban Authority. The end date of this WP is the last day before the start of the project implementation phase.

### 3.2. CREATION OF THEMATIC WORK PACKAGES AND TRANSFER WORK PACKAGE

The part D – Workplan is by default composed of the WP Project Preparation and Initiation Phase, WP Project Management, WP Monitoring and Evaluation, WP Communication and Capitalisation and WP Closure.

To create a Thematic or a Transfer work package, the user should use the following buttons available in the page Overview in part D – Workplan.



WP Nr.	Title	Work package type	Start date	End date
1	Project Preparation and Initiation Phase	Project Preparation and Initiation Phase	02.05.2024	30.09.2025
2	Project Management	Project Management	01.10.2025	31.03.2029
3	Monitoring and Evaluation	Monitoring and Evaluation	01.10.2025	31.03.2029
4	Communication and Capitalisation	Communication and Capitalisation	01.10.2025	31.03.2029
5	Closure	Closure	01.04.2029	30.06.2029

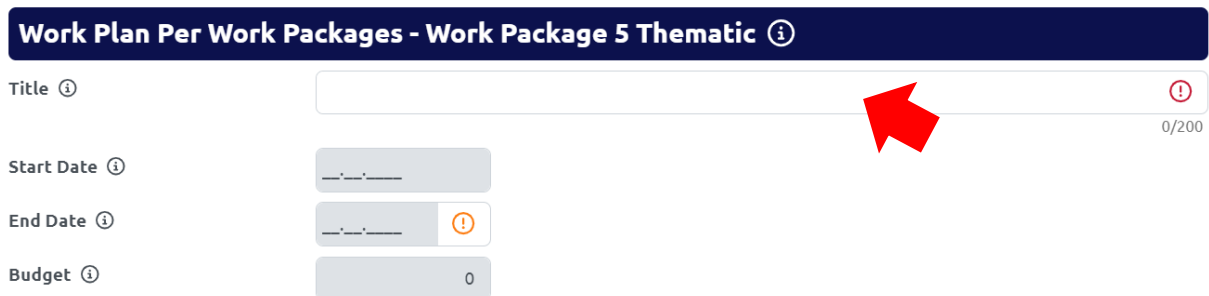
### 3.3. THEMATIC WORK PACKAGES AND INVESTMENTS

A Thematic WP has a slightly different logic than the others, as the latter can include one or several "investment" items.

Applicants are allowed to include investments within relevant Thematic WPs if needed and properly justified. As a rule, investments shall be foreseen in the EUI-IA projects only to the extent that they are necessary for the achievement of the project's outputs and results. Find more information on Investments on the EUI Guidance (2.2.6 Thematic Work Packages).

To add an "investment" item under a Thematic WP, the applicant must follow these two steps:

1. Create first a Thematic WP and save it (the only compulsory field required for creating such WP is the field "Title").



2. The button "Add Investment" becomes then active on the same page. By clicking on it, a new dedicated page appears. All the fields of this page are editable. To validate the creation of an "investment" item, the applicant must fill in all the required elements and click on Save (also available here at the top of the left menu).



(see next page view of the above-mentioned page appearing after having clicked on "Add Investment")

**Investment 1** ⓘ

**Title** ⓘ  0/200

**Investment Description** (including indicative budget of the main cost items)  0/1500

**Delivery date** ⓘ  ⓘ

**Budget** ⓘ

Investment aspects	Questions	Project answers
Justification of the investment	Explain why this investment is needed.	<input type="text"/> 0/1000
	Clearly describe the thematic relevance of the investment.	<input type="text"/> 0/1000
	Describe who is benefiting (e.g., Partners, city, region, target groups, etc.) from this investment, and in what way.	<input type="text"/> 0/1000
	Please clarify which problem it tackles, which findings you expect from it, how it can be replicated, and how the experience coming from it will be used for the benefit of the programme area.	<input type="text"/> 0/1000
	Describe the location of the physical investment; if possible, a specific address where the investment	<input type="text"/> ⓘ

Once the new “investment” item is saved, the user can see a summary table of the investment(s) back in the Thematic WP page. An investment can be modified at any time by clicking on the related item in the table.

**Investments** ⓘ

**1.5.1 - Alpha** 🗑️

**Title** Alpha  5/200

**Budget** 1,000,000.00

**Delivery date** 30.06.2028

**Description**

Alpha / ælfə/ (uppercase A, lowercase a; Ancient Greek: ἄλφα, álpha, or Greek: ἄλφα, romanized: álfa) is the first letter of the Greek alphabet. In the system of Greek numerals, it has a value of one. Alpha is derived from the Phoenician letter aleph, which is the West Semitic word for "ox". Letters that arose from alpha include the Latin letter A and the Cyrillic letter A.

376/1500

**ADD INVESTMENT**

The total budget assigned to the investment(s) should then be reflected in the Thematic WP budget tables. Please note that this is automatically done for the “Indicative budget breakdown per activities and investments” table.

### 3.4. CLOSURE WORK PACKAGE

The WP Closure is predefined by the system. The only involved and responsible partner on this WP is the Main Urban Authority. The end date of this WP is the last day of the third month after the end of the project implementation phase.

## 4. HOW TO ADD USERS TO YOUR PROJECT APPLICATION FORM

New users can be added to the AF as soon as the proposal is created in the EEP. To do so, the lead applicant should access the Dashboard section (left menu) and move to the table "Project Users".

The screenshot displays the application form interface. On the left is a dark blue sidebar menu with a 'Dashboard' button highlighted by a red arrow. The main content area is divided into several sections: 'Financial Overview' at the top, 'Project Users' in the middle, and 'Latest Notifications' at the bottom right. The 'Project Users' section contains a table with the following data:

Role	Name of organisation in original language	Email	Status	
MUA	Main Urban Authority	innovativeactions@urban-initiative.eu	Active	

Below the table is a pagination control showing '1' of 1 records. A red box highlights the 'ADD NEW USER' button and the table. The 'Latest Notifications' section shows 'No records available.'

A new user can be added by using the button "+ Add New User" and then filling in all the requested fields.

The 'Add New User' form is a modal window with a green header. It contains two input fields: 'Partner' with a dropdown menu showing 'Please select...' and 'Email' with a text input field. Both fields have a red exclamation mark icon to the right, indicating a validation error. At the bottom of the form are two buttons: 'CANCEL' and 'SAVE'.

The new user will receive an automatic email to complete her/his account creation (see section 1 of this guidance). If the person has already an active account, s/he will receive a notification informing that s/he has been granted an access to the AF in question.

➤ Point of attention: AF submission

New users get automatically edit rights – i.e. a user can modify/fill in all the AF sections and submit it. We strongly recommend identifying and designating the user responsible for the submission of the AF beforehand.


➤ Point of attention: risk of overwriting information

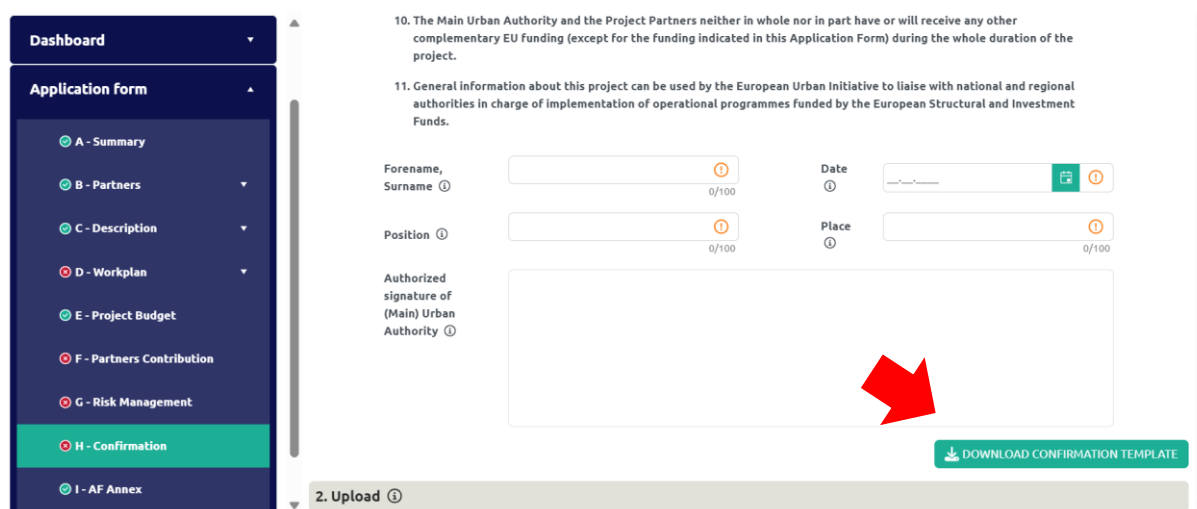
To a certain extent, it is possible for different users to work in parallel (at the same time) on the same AF. When working in parallel, users must make sure that they are not working simultaneously in the same section or sub-section, as they run the risk of overwriting information.

Granting access rights to new users should be done parsimoniously, and coordinating who is working when in the AF is crucial for a smooth use of EEP during the application phase.

## 5. HOW TO UPLOAD THE CONFIRMATION SHEET


To submit a project proposal, the Confirmation Sheet must beforehand be downloaded (see below button "Download Confirmation template"), printed, signed, scanned in PDF format and then uploaded in the part H – Confirmation.


The Confirmation Sheet is accessible at any time during the application process in the part H – Confirmation. The applicant has the possibility to add information on the person in charge of the signature of the Confirmation Sheet by filling in the following fields marked with . When downloading the Confirmation Sheet, the existing information on these fields is automatically generated in the PDF.





10. The Main Urban Authority and the Project Partners neither in whole nor in part have or will receive any other complementary EU Funding (except for the funding indicated in this Application Form) during the whole duration of the project.


11. General information about this project can be used by the European Urban Initiative to liaise with national and regional authorities in charge of implementation of operational programmes funded by the European Structural and Investment Funds.

Forename, Surname  0/100


Date 

Position  0/100

Place  0/100

Authorized signature of (Main) Urban Authority 

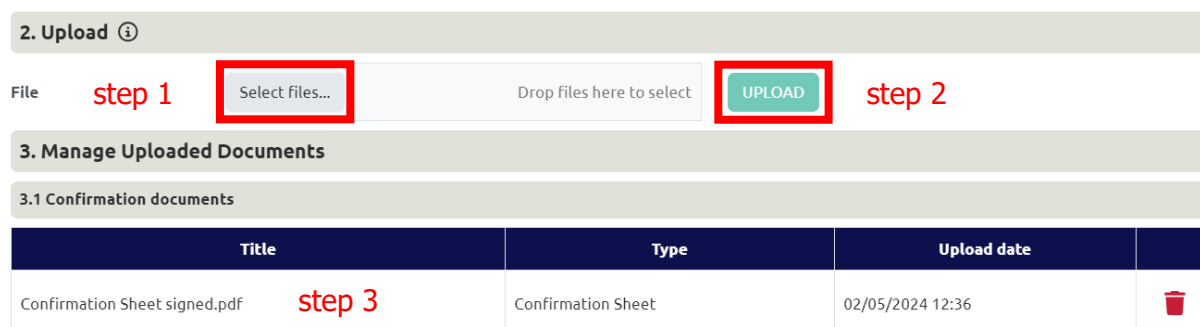
[DOWNLOAD CONFIRMATION TEMPLATE](#)


2. Upload 

➤ How to **upload** the Confirmation Sheet in the EEP?

The upload should be done in part H – Confirmation, in the section "Upload" (right below the button "Download Confirmation template").

The applicant selects the scanned document (in PDF format) to be uploaded by clicking on "Select files" (step 1). Once done, the user uploads it by clicking on "Upload" (step 2). The document appears right after under the table "Manage Uploaded Documents" (step 3). If this is not the case, the upload was not successful and the steps 1 and 2 should be repeated.




2. Upload 

File **step 1**  Drop files here to select  **step 2**

3. Manage Uploaded Documents

3.1 Confirmation documents

Title	Type	Upload date	
Confirmation Sheet signed.pdf <b>step 3</b>	Confirmation Sheet	02/05/2024 12:36	

➤ Point of attention: e-signature allowed

All applicants must upload a signed Confirmation Sheet. The use of electronic signature is accepted.

## 6. HOW TO UPLOAD AN ANNEX (OPTIONAL)

One additional document can be uploaded to the AF as annex - the maximum size of the file is 5 MB (preferably as PDF). Applicants can upload this annex in part I – AF Annex.

➤ How to **upload** an annex in the EEP?

The applicant selects the document to be uploaded by clicking on “Select files” (step 1). Once done, the user uploads it by clicking on “Upload” (step 2).

The document appears right after under the table “Manage Uploaded Documents” (step 3). If this is not the case, the upload was not successful and the steps 1 and 2 should be repeated.

### Part I - Annex

#### 1. Upload ⓘ

File **step 1**  Drop files here to select  **step 2**

#### 2. Manage Uploaded Documents

##### 2.1 Annex document

Title	Type	Upload date	
AF Annex.pdf <b>step 3</b>	Application Form Annex	02/05/2024 13:42	


Description of the annex (where relevant)

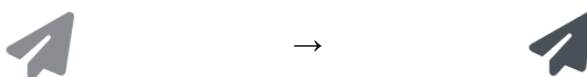
0/250



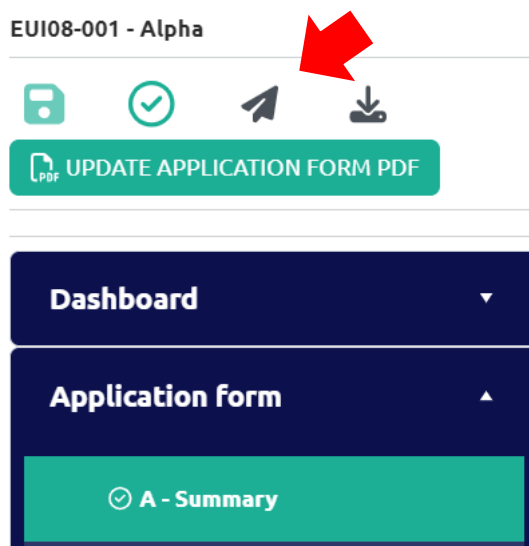
## 7. SUBMISSION OF THE APPLICATION FORM

Once the Confirmation Sheet is duly signed and uploaded in the part H – Confirmation (see previous section), the applicant is in the position of submitting the AF.

The AF can be officially submitted only when all automatic checks are successfully passed and no errors are detected in each part of the AF (in other words, when a “green light”  appears next to each part in the left menu). The button “Submit” becomes then active (i.e. from light to dark grey).



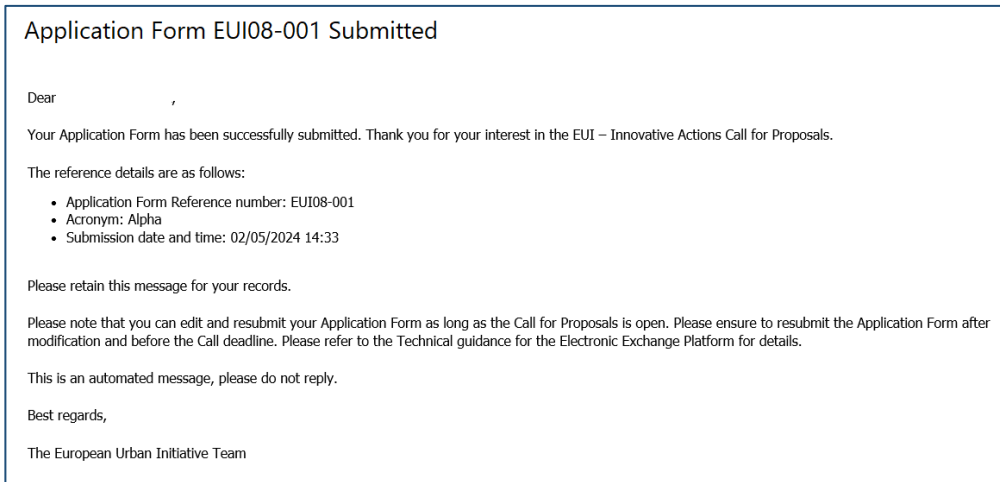
This specific function is present at the top of the left menu only in the part A – Summary and in the part H – Confirmation.




- Point of attention: Completeness and consistency checks are run by the system, **but** the EEP does not check the quality of information provided. Therefore, it remains the applicants’ responsibility to read carefully information included in the EUI guidance, go through their AF and verify that all necessary fields are properly filled in.

After clicking on “Submit”, a pop-up window appears asking the applicant to confirm the submission of the AF: please read it carefully and validate the submission by clicking on “Yes”.


After the submission of the AF, the applicant will receive an automatic confirmation email:



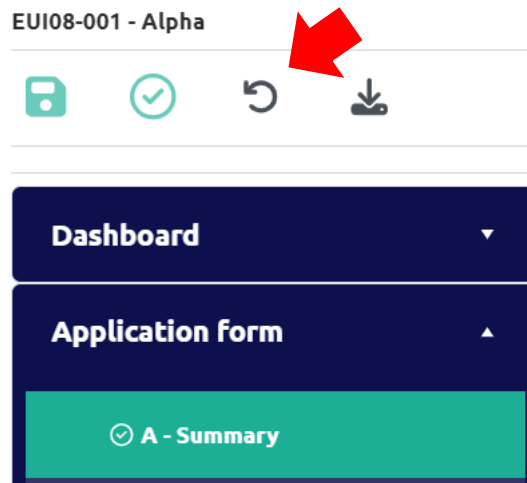
- **Point of attention:** The confirmation email is sent out to the user having triggered the submission of the AF, the contact person of the MUA (part B – Partners) as well as the other MUA users added to the project AF (see section 4 of this guidance).

After the submission, the applicant can generate at any time a PDF version of the AF by clicking on the function "Download PDF"  in part A – Summary.

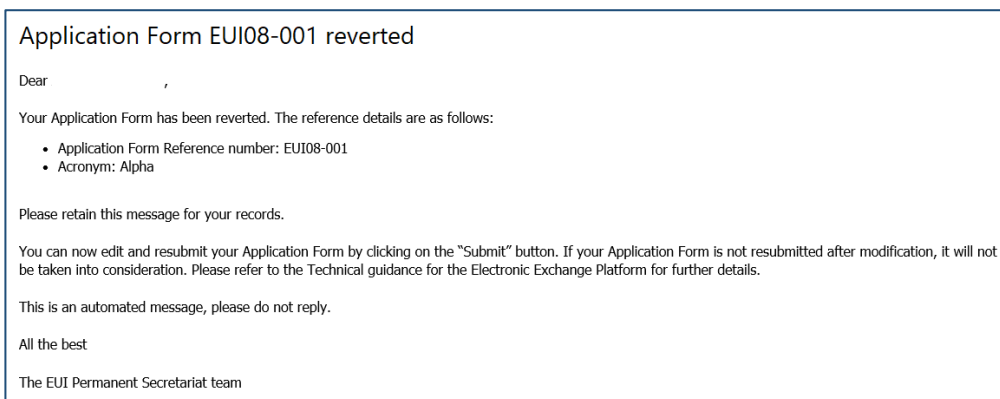
## 8. MODIFICATIONS AFTER SUBMISSION

Applicants are allowed to modify their AF until the closure of the call for proposals. In order to do modifications after submission, the applicant can revert the AF by clicking on the function "Revert" .

This specific function is present at the top of the left menu only in the part A – Summary and in the part H – Confirmation.



After reverting the AF, a notification is sent to the applicant:



- Point of attention: The above confirmation email is sent out to the user having triggered the revert of the AF, the contact person of the MUA (part B – Partners) as well as the other MUA users added to the project AF (see section 4 of this guidance).

Please note that a reverted AF needs to be **resubmitted** in order to make it valid for evaluation. The submission must be done before the end of the call.

## 9. HELPDESK AND TECHNICAL SUPPORT

For any problems you might experience with the EEP, please contact the helpdesk at [innovativeactions@urban-initiative.eu](mailto:innovativeactions@urban-initiative.eu) or you can also call us on +33 (0)3 61 76 59 34.

To facilitate the handling of your requests, we invite you to communicate us the following elements (when relevant):

- the project name
- the project ID
- the user account facing a problem (i.e. the email address used during the registration phase)
- a screenshot and/or the alert message appearing on your screen



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Les Arcuriales, 45D rue de Tournai, 7th floor, 59000 Lille - France  
[info@urban-initiative.eu](mailto:info@urban-initiative.eu) - [www.urban-initiative.eu](http://www.urban-initiative.eu)